



In an effort to provide guidance to providers who are considering moving from submitting state required data elements through ISMART to direct electronic submission to the Central Data Repository (CDR), the following information is to be taken into consideration when planning the conversion process.

ISMART and the CDR have a dynamic relationship and count on unique record identifiers to link records when “dumped” from ISMART into the CDR by FEi. Because of this relationship between the two data systems, the following options are available to providers looking to convert from ISMART data reporting to electronic submission to the CDR.

The Cut-Over Date (COD) as referenced below, will be established once all five test file types to the CDR have been tested and approved by FEi and IDPH.

**1. Scenario 1 (Parallel Data Entry)**

- a. COD is mutually determined by provider, IDPH, and FEi.
- b. Prior to the COD, provider must complete all outstanding discharges (clients without any services entered into ISMART in the last 60 days) in ISMART.
- c. On the COD, the program will stop entering new client profiles into ISMART (date to be determined upon completion of successful testing).
- d. Parallel entry
  - i. New Client data (profile, admission, services, discharge and follow up) will be submitted to the CDR electronically.
  - ii. Continue ISMART data entry for active clients on the COD, up to and including discharge and follow-up.

**2. Scenario 2 (ISMART Case Closure)**

- a. COD is mutually determined by provider, IDPH, and FEi.
  - i. A date will also be established in which new clients are no longer entered into ISMART.
- b. Program will discharge every open case in ISMART and close each record.
  - i. Discharge Reason can be “Transfer” except for those clients who have not had a service entered in the past 60 days.
    - Admission “Transfer” records would then be created in the EHR for clients still active in services.
  - ii. Programs will need to talk to their EHR vendor of the implications of discharging all clients in ISMART, as this may also need to happen in the programs EHR.
- c. Program will then create electronically client profile and admission record for all active clients to be submitted to the CDR (using COD date as admission date).
  - i. This will affect Admission and Discharge/admission counts, but not have any bearing on the program’s IDPH minimum client and service counts.
- d. New Client data (profile, admission, services, discharge and follow up) will be submitted to the CDR electronically for clients.
- e. To avoid duplicate data submitted to the CDR, the provider will work with their EHR vendor to modify key fields within the EHR system for client records that exist in ISMART and the CDR. See Appendix A for more details regarding CDR Key Fields.

### **3. Scenario 3 (CDR Purge)**

- a. This option can only be used if the provider EHR has all the state data reporting elements historically from July 1, 2009 forward.
- b. COD is mutually determined by provider, IDPH, and FEi.
  - i. A date will also be established in which new clients are no longer entered into ISMART.
  - ii. ISMART cases remain open in ISMART and FEi excludes program from the “data dump” script for future ISMART to the CDR data transfers.
- c. FEi purges all Program data for all five file types from the CDR.
- d. \*Program would then submit all client data (client profile, admission, services, discharge, and follow-up data) from July 1, 2009 to present.

\*Would result in duplicate TEDS records being created, which will be rejected by TEDS as duplicates, except for where new records are being sent (FOR IDPH/FEI Information)

**Appendix A**  
**CDR Key Fields**

Client	Admission	Services	Discharge	Follow Up
<ul style="list-style-type: none"> <li>• Source Client Id</li> <li>• Client No</li> </ul>	<ul style="list-style-type: none"> <li>• Source Admission Id</li> <li>• Source Episode Id</li> <li>• Source Client Id</li> <li>• Client No</li> <li>• Activity Date</li> <li>• Event Type Code</li> </ul>	<ul style="list-style-type: none"> <li>• Source Service ID</li> <li>• Source Episode ID</li> <li>• Source Client ID</li> <li>• Client No</li> <li>• Source Admission ID</li> <li>• Event Type Code</li> <li>• Start Date</li> </ul>	<ul style="list-style-type: none"> <li>• Source Discharge ID</li> <li>• Source Episode ID</li> <li>• Source Client ID</li> <li>• Client No</li> <li>• Source Admission ID</li> </ul>	<ul style="list-style-type: none"> <li>• Agency ID</li> <li>• Source FollowUp ID</li> <li>• Source Episode ID</li> <li>• Source Client ID</li> <li>• Client No</li> <li>• Source Admission ID</li> <li>• Contact Date</li> </ul>

**Note:** Additional fields may be necessary to adequately match client records.